T O U R I S M

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY

CITY TRIP VACATIONS

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

RC
142
.D81513C
1991
v.4

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY

CITY TRIP VACATIONS

Prepared for:
B.C. Ministry of Development, Trade and Tourism
and
Industry, Science and Technology Canada

Prepared by:
Campbell Goodell Consultants

October 1991

92-02785/

ACKNOWLEDGEMENT

This study was funded through the Canada - British Columbia Tourist Industry Development Subsidiary Agreement. The Agreement, which provides a variety of programs for tourism development, is cost-shared equally by the government of Canada and British Columbia. All of the activities undertaken through this Agreement are approved by a federal/provincial Management Committee established for administration of the Agreement.

The Canada - British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreement (ERDA) signed in November, 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada

Industrie, Sciences et Technologie Canada

British Columbia
Ministry of Development, Trade and Tourism

For additional copies of this publication and/or further information about the Canada - British Columbia Tourism Industry Development Subsidiary Agreement, contact:

Ministry of Development, Trade and Tourism
Research and Information Management
#300 - 1803 Douglas Street
Victoria, B.C.
V8T 5C3
Telephone: (604) 356-9932

or

Industry, Science and Technology Canada
P.O. Box 11610
900 - 650 West Georgia Street
Vancouver, B.C.
V6B 5H8
Telephone: (604) 666 - 0434

Canadian Cataloguing in Publication Data
Main entry under title:
United States market match survey. City trips

"Funded through Canada-British Columbia Tourist Industry Development Subsidiary Agreement."
On cover: Economic & Regional Development Agreement, Canada, BC.
ISBN 0-7718-9074-5

1. Tourist trade - British Columbia. 2. Travelers - United States. I. British Columbia. Ministry of Development, Trade and Tourism. II. Campbell Goodell Consultants. III. Canada-British Columbia Tourist Industry Development Subsidiary Agreement. IV. Canada/BC Economic & Regional Development Agreement.

G155.C3U53 1991 338.4'791711044 C91-092248-9

TABLE OF CONTENTS

Page

BACKGROUND 1

METHOD 2

PRODUCT DESCRIPTION

A. Size of Potential Market 3

B. Market Demographics 5

C. Cluster Analysis 8

D. Travel Experience and Interests 13

E. Specific Product Preferences 18

F. Media Factors 30

G. Marketing Implications 37

APPENDIX

QUESTIONNAIRE

BACKGROUND

The Ministry of Development, Trade and Tourism in British Columbia is concerned that the province remain competitive in the international tourism market. B.C. has resisted the decline in tourism most successfully during 1989 and 1990, while other Canadian provinces have suffered seriously. The task at hand now is to make B.C. more attractive to the potential international tourist, thereby ensuring that our industry will remain healthy in the years ahead.

This report forms part of the results derived from the 1991 U.S. Product Market Match Study, a project undertaken by Campbell Goodell Consultants to assess the market potential of current and future British Columbia tourism products in key United States centres and to provide a matching between these products and the characteristics of the market segments most interested in these products.

This is one of a series of four reports, each one devoted to one of the major vacation types investigated in the study. These were: the resort vacation, the city trip, the outdoor adventure and the touring vacation.

METHOD

The results reported below are based on a telephone survey conducted by Campbell Goodell Consultants Limited, in conjunction with Gilmore Research Group, in six American cities representing major sources of travellers to British Columbia. Interviews were conducted during the month of February, 1991, in Seattle, Portland, San Francisco, Los Angeles, Dallas and Chicago. A breakdown of the number of interviews per city is as follows:

Seattle	164
Portland	162
San Francisco	160
Los Angeles	160
Dallas	162
Chicago	161
	969

The survey was limited to those respondents, 25 years of age or older, who have travelled outside the United States during the past three years or who plan to do so in the next two years.

A second part of the study was provided by Compusearch Market and Social Research of Vancouver, using their Lifestyle Analysis procedure. This procedure assigns a lifestyle code to each of the respondents. There are 47 different groups in all (although only about six of these appear frequently among American visitors to British Columbia). Members of each group share common characteristics, including travel preferences.

PRODUCT DESCRIPTION

"A city trip" was defined for respondents in the survey as follows:

> "A city trip, where you could shop, visit museums, enjoy entertainment, dine, attend plays or concerts or just stroll and enjoy the city."

A. SIZE OF POTENTIAL MARKET

Estimating the size of the potential market for B.C. city trip vacations involves assessing respondents' likelihood of visiting B.C. for this particular type of vacation. In order to do this, rating information was collected using a scale from 1 (not at all interested) to 5 (extremely interested). A conservative approach was applied to obtain market potential projections using the five (extremely interested) ratings only. A more optimistic approach would use both the four and five ratings. We will present both sets of information but will focus our projections on the five (extremely interested) ratings.

Twenty-nine percent of the travellers said they would be extremely interested in city trips at some future date. Since not all of these people have British Columbia in mind, we must reduce the potential market accordingly. Fifty-four percent of those extremely interested in city trips also say they are extremely interested in B.C. vacations, yielding a net of 15 percent of all respondents.

In order to estimate the actual market potential that exists for city trip vacations to B.C., we need to look at the overall percentage of travellers who have travelled outside the U.S., or plan to, and the total population of the area. These figures can be seen in Table I below.

Table I: Market Potential of U.S. International Travellers

	MARKET SIZE					
	Seattle - King Co.	Portland-Multomah Co.	San Fran Bay Area - S.F. Co.	Los Angeles - L.A. Co.	Dallas - Dallas Co.	Chicago - Cook Co.
1990 Population	1,000,702	371,779	3,934,685	5,518,676	1,176,450	4,968,305
Incidence of Internat. Travellers (25+)	28.7	14.4	30.9	15.3	14.7	17.2
Market Size	287,201	53,536	1,215,818	844,357	172,938	854,548

By applying the 15% of the travellers who were extremely interested in visiting B.C. on city trips to the market size for each city given in the previous table, we are able to determine the potential for city trip vacations to B.C. The results of this calculation are shown in Table II.

Table II: Potential U.S. Travellers to B.C. for City Trip Vacations

Seattle Area	43,080
Portland Area	8,030
San Francisco Area	182,372
Los Angeles Area	126,654
Dallas Area	25,941
Chicago Area	128,182
Total	514,259

This approach to estimating suggests a total potential market of 514,000 U.S. travellers who would be extremely interested in taking city trips to B.C. In terms of the number of people that make up the potential market, travellers from the San Francisco area constitute the largest group with 180,000. The Los Angeles area is the second largest market; third in size is Chicago.

Fourth and fifth in order of potential market size are Dallas and Seattle. The smallest market is in Portland, which has a potential of 8,000 travellers.

Note that these are estimates of the total number of travellers. Since they do not take into account the frequency of travel, they will be smaller than the total number of visits, especially for the more proximate cities.

B. MARKET DEMOGRAPHICS

In order to determine the types of travellers that might take city trip vacations to B.C., we need to examine the demographics of the market. In this way, advertising can be directed to the appropriate target groups thereby increasing the effectiveness of the message.

Table III gives us the breakdown of who makes the travel decisions in the households that favoured city trips.

Table III: Major Travel Decisions in Household

Q64. Who makes the major travel decisions in your household?

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	967	236	283
Male Head of Household	28%	26%	27%
Female Head of Household	30	29	39
Both Together	41	45	33
Someone Else	1	0	1

Households which were extremely interested in city trips generally had the travel decisions made by the female heads of household, with four out of ten travellers claiming this to be the case.

A third of this sample stated that travel decisions were made by both partners together, and one out of four felt that the male heads of households made these decisions. With respect to both partners making travel decisions, we see that people who are interested in city trips are quite unlike the other travellers with far fewer joint travel decisions being made.

Table IV shows the age distribution of the respondents who are most interested in city trip vacations.

Table IV: Age Distribution of Respondents

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	969	237	283
Under 25	1%	0%	1%
25 to 34	33	36	33
35 to 44	28	30	29
45 to 54	17	17	15
55 to 64	10	9	10
65 and over	11	8	12

In terms of age, travellers interested in city trips are very much like other travellers. The largest percentage of travellers came from the 25 to 34 age group, accounting for more than a third of the respondents in that category. This was followed closely by people in the 35 to 44 age group, with three out of ten travellers indicating they were extremely interested in city trips. The least amount of interest in a city trip came from people under 25.

Table V shows the gender distribution of the respondents who were most interested in city trip vacations.

Table V: Gender Distribution of Respondents

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Total Respondents	969	237	283
Female	55%	54%	67%
Male	45	46	33

Substantially more females are extremely interested in city trip vacations, representing the two-thirds of respondents indicating this preference. The number of females who were extremely interested in this type of vacation is double the number of males in this category.

In addition, we need to look at the cities from which the travellers originate. In this way, we are able to identify the areas which could be targeted in the advertising for city trip vacations to B.C. Table VI gives us this breakdown.

Table VI: City Of Interview

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	969	237	283
Seattle	17%	17%	15%
Portland	17	17	16
San Francisco	16	17	19
Los Angeles	16	17	17
Dallas	17	17	16
Chicago	17	15	17

The percentage of travellers extremely interested in city trip vacations did not differ substantially between the various cities. Travellers from San Francisco made up a slightly higher percentage of the extremely interested category than respondents from the other cities.

C. CLUSTER ANALYSIS

As a part of the interview, a street address and/or nine-digit postal code was collected from each respondent. This information was processed by Compusearch Market and Social Research. The result of this work was to identify each of the respondents in the survey with one of 47 possible geodemographic clusters.

The geodemographic clusters produced by the Compusearch analysis are based on aggregated data provided by the U.S. Census. Each small geographic area, roughly comparable to a Canadian postal code area, is characterized in terms of the average income, family composition, housing type and so forth. In fact, some 1600 indicators are used to characterize each area.

Once the area of residence of a respondent is known, he or she is assigned to the cluster into which this area of residence has been classified. This so-called "lifestyle cluster" allows the analyst to infer from the cluster identity a whole range of behaviours which the individual respondent is likely to share with other members of his or her cluster.

Of the forty-seven possible clusters, those respondents who have visited British Columbia or who plan a visit to the province tend to group into just six of them. These six represent over 45 percent of the total sample. Because these are the largest clusters and because they have a history of visiting British Columbia, they represent the most attractive targets for marketing and are treated in some detail in our analysis.

The following paragraphs give the basic descriptions of the six clusters which are the most important descriptors of international travellers living in the six sampled U.S. cities. The detailed demographics and product preferences of each of these groups can be found in the appendix.

Definitions of the Clusters

Affluent Urban Singles (Cluster 7)

Neighbourhoods in which members of this cluster live tend to be populated by upscale professionals. Often residents of high-priced urban and suburban apartments and condos, these high income singles lead an active lifestyle characterized by sporting activities, travel and an avid appetite for entertainment events of all kinds. Affluent Urban Singles tend to be aware of the newest trends and technologies, and indulge their taste for the new and different in areas as diverse as home entertainment systems and personal exercise equipment. Their purchase preferences lean toward high quality merchandise of all kinds, particularly home technology products. Financially, they tend to be greater risk-takers than some of their older cluster counterparts and concentrate more on investments with higher risk and bigger payoff.

This cluster represents 2.9 percent of the adult population of the United States and 13.5 percent of the present sample.

Young Professionals (Cluster 10)

Members of this cluster tend to live in neighbourhoods characterized by the presence of young, average income, single professionals. The members of this cluster share many characteristics with their more upscale High Rent Single Professional counterparts, including multi-unit dwellings and active lifestyles. Unlike the latter, however, Well-Educated Young Single Professionals tend to be younger and less asset rich. Extremely fitness and health conscious, their interests include sporting goods, gourmet and health foods and exercise equipment. While their income is still growing, these individuals indulge their taste for luxury with credit products including personal loans and credit cards. They are, however, beginning to accumulate assets in long-term deposit instruments and are likely, when able, to invest in brokerage accounts.

This cluster comprises 1.4 percent of the U.S. adult population and 6.5 percent of the sample.

Highly Mobile Working Couples (Cluster 12)

These above-average income, white collar workers are likely to live in two income families. Their primary focus is on their homes - expenditures on home furnishings and technologies are significantly higher than the national average. That is not to imply, however, that Young Mobile Working Couples with Children are homebodies. These young families are also active in a number of sports activities including golf, tennis, racquetball and skiing.

This cluster accounts for 3.8 percent of the U.S. adult population and 6.3 percent of the present sample.

Young Urban Educated Singles (Cluster 17)

Characterized as young, well educated and single, residents of these clusters lead the active single life. Although they may earn only average incomes, their education and professional experience combine to predict an upwardly mobile lifestyle. These individuals tend to reside in high rent apartments, and enjoy an upscale lifestyle. Well-Educated Young Mobile Single Apartment-Dwellers are avid participants in sports ranging from bicycling to racquetball, but their activities are not confined to the sports arena. They also enjoy live theatre, concerts, movies, and restaurant dining on a frequent basis. In addition, they appreciate the quality in articles as diverse as fashionable clothing and imported wines.

This cluster makes up 2.2 percent of the adult American population and 7.0 percent of the sample.

Young Urban Ethnics (Cluster 24)

An urban based cluster, this group contains households living in multi-family dwelling units, typically earning low incomes. Characterized by singles, Young Urban Ethnic Low Income Mobile Single households are likely to be headed by either females or members of various ethnic groups. The ethnic nature of this segment translates into a strong demand for gourmet and imported food items and beverages. This feature makes Young Urban Ethnic Low Income Mobile Single areas excellent target markets for products and services which have an ethnic appeal, as well as travel related services associated with their ethnic origins. In addition, these individuals are good markets for sporting activities, demonstrating a propensity for skiing, camping, jogging and attendance at professional sporting events.

Members of this cluster make up 2.6 percent of the U.S. adult population and 7.9 percent of the sample.

Young Mobile Apartment Dwellers (Cluster 25)

The urban areas in which members of this cluster live represent a younger, active segment - similar to Young Urban Ethnics without the ethnic flavour. Apartments, below average income and blue collar occupations typify these city-based households. Product preferences associated with this group include soft drinks, domestic beer and snack candy, as well as activities such as camping, skiing and fishing. Households living in Cluster 25 areas are also more likely than average to be headed by females.

In the U.S. adult population, 2.6 percent of adults belong to this cluster, as compared to 4.4 percent of the sample.

These cluster descriptions contain information that might have been anticipated. For example, we find that a large proportion of international travellers are young, often living in rented housing. Both characteristics correlate with high levels of mobility and, naturally enough, a high incidence of international travel.

Other patterns might not have been guessed. There is a high proportion of ethnics in the sample, especially Hispanics. This is doubtlessly due to the fact that many Hispanic residents of Los Angeles and Dallas travel to Mexico to visit relatives on a relatively regular basis. While level of interest in travel to Canada is relatively high, so is the level of disinterest, suggesting that this will probably be a difficult cluster to attract.

Finally, perhaps the most surprising characteristic of the six clusters described above is that they are not high income earners. Only two of the clusters are above average in income and only one can be described as "up-scale." One reason this occurs is of course because there are more middle income people in the population, even of the population of international travellers, than there are high income people. These data also suggest that people who visit British Columbia may be less affluent than those who travel to other international destinations.

We would be remiss not to point out, however, that in spite of their small numbers, members of the up-scale clusters in the sample do travel internationally with disproportionate frequency. The following lists the most affluent clusters, all of which are higher on the socio-economic scale than the top cluster described above. In addition, we provide the proportion each cluster comprises of the U.S. population and of the sample, as well as an index of over-representation (the quotient of the two previous figures).

Cluster	% of U.S.	% of Sample	Index
Top income, highly educated professionals in prestige homes	1.5	3.1	209
Well-educated mobile professionals in new homes and condos	1.2	1.8	148
Younger mobile professionals, home-owners with children	2.2	3.4	157
Mature Professionals with larger families (teenagers)	1.7	2.4	141
Non-mobile professionals in established communities	2.7	4.9	182
Younger mobile large families with children in new homes	3.1	3.2	104

We can see that all of these clusters are more likely than average to be international travellers. While they represent just over 12 percent of the adult population of the U.S., they comprise nearly 19 percent of international travellers in our sample. Some of this over-representation arises from the fact that our sample is restricted to urban areas where these clusters tend to live. Nevertheless, individuals in these groups should also receive marketing attention, particularly since they do not report much travel to British Columbia. This is especially true of any segment of the provincial tourism industry which is targeted toward up-scale travellers, such as wilderness resorts.

Importance for City Trip Vacations

The clusters with the highest level of interest in city trip vacations are:

Cluster 7 (Affluent Urban Singles), with 35% expressing interest in city trips. More than half of this group comes from San Francisco/Los Angeles. the majority have not visited B.C. and know very little about B.C. as a vacation destination. They expect to travel by air and plan to spend an average of 15 nights away from home.

Cluster 17 (Young Urban Educated Singles), of whom 33% say they are interested in city trips. They live in all of the cities sampled and are willing to pay more for their city trips than any of the other cluster groups. They are inclined to fly to their destinations and plan an average of 12 nights away. Like the other groups, their knowledge of B.C. is limited.

D. TRAVEL EXPERIENCE AND INTERESTS

An examination of respondents' travel experiences and their future plans will assist in determining the preferences of the travellers and the size of the potential market for B.C. The number of people who indicate a willingness to travel to B.C. in the near future would constitute part of the potential market.

In order to establish the past history of these travellers, respondents were asked about their travel destinations in the last 3 years, and this can be seen in Table VII. We note, however, that many respondents gave more than one response for this question.

Table VII: Vacation Destinations of the Last 3 Years

Q3. Thinking of your major vacation travel to any location, what vacation destination have you travelled to in the last three years?

		Interested in City Trips	
	Total Sample	Four	Five
Total Number	969	237	283
Europe	33%	35%	35%
Mexico/Central/South America	30%	33%	28%
Other U.S. States	20%	23%	205
Other	19%	17%	22%
California	14%	14%	19%
Caribbean	13%	11%	13%
Asia	12%	11%	095
Vancouver	**11%**	**13%**	**11%**
Hawaii	11%	13%	10%
Pacific Northwest	6%	7%	5%
Australia/New Zealand/ South Pacific	6%	4%	6%
Other Canada	6%	5%	6%
Victoria	**5%**	**6%**	**6%**
Ontario	4%	6%	3%
Other B.C.	**4%**	**2%**	**4%**
None	4%	4%	2%
Alaska	3%	2%	4%
Alberta	1%	1%	1%

Europe was the major vacation destination that respondents had travelled to in the last three years. Mexico, Central America and South America was a close second with other U.S. states coming in as the third most popular vacation. The place that had been least selected for a vacation was Alberta.

In terms of B.C. as a vacation destination, 11% of the travellers who were extremely interested in city trips had been to Vancouver in the last three years. Victoria came in fourteenth in the list of locations that were mentioned by respondents, with 6% having visited it recently. Other places in B.C. had been a destination for 4% of the travellers. After eliminating the multiple B.C. destinations for each traveller, we have a net of 15% of the respondents who were extremely interested in a city trip who mentioned B.C. as their destination at least once. This percentage would constitute the market of existing travellers that could be attracted back into the province.

In the next table, we look at what destinations these respondents are planning to visit in the next 2 years.

Table VIII: Vacation Destinations in the Next 2 Years

Q4. And what destinations do you have firm plans to visit during the next two years?

	Interested in City Trips		
	Total Sample	Four	Five
	9269	237	283
None	27%	30%	23%
Europe	21%	23%	22%
Mexico/Cent./Sth. America	16%	18%	15%
Other U.S. States	13%	14%	14%
Other	13%	12%	15%
Caribbean	7%	5%	6%
Asia	7%	5%	6%
Hawaii	6%	6%	8%
Australia/New Zealand/ South Pacific	6%	5%	8%
Vancouver	**5%**	**3%**	**6%**
California	5%	7%	6%
Pacific Northwest	4%	3%	5%
Other Canada	3%	4%	3%
Ontario	2%	2%	2%
Other B.C.	**2%**	**2%**	**3%**
Alaska	2%	2%	2%
Victoria	**1%**	**0%**	**2%**
Alberta	1%	1%	1%

Europe was again the main destination for most travellers who were extremely interested in city trips in the next two years. This was followed by Mexico, Central and South America. Other U.S. states was also a popular choice for many of these respondents.

In terms of potential market for B.C., Vancouver was a choice for 6% of the travellers who were extremely interested in city trips. Other B.C. destinations and Victoria would only be visited by about 5% of the respondents from the same group. The net number of people who say they will take at least one vacation to B.C. in the next two years is 10% of those very interested in city trips, which represents a higher than average number of travellers when compared to the total sample.

The next question deals with the respondents' knowledge of B.C. as a vacation destination.

Table IX: Knowledge of B.C. as a Vacation Destination

Q44. How much do you know about B.C. as a vacation destination?

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	961	234	280
A great deal	11%	11%	10%
A moderate amount	32	33	32
A little	34	33	33
Nothing at all	23	23	25

Two-thirds of the travellers who were extremely interested in city trips knew a moderate amount or a little about B.C. However, a quarter of the travellers knew nothing at all about B.C. as a vacation destination.

The number of travellers who have taken a vacation in B.C. is shown in the next table.

Table X: Number of Travellers Who Have Taken A Vacation In B.C.

Q45. How many times, if any, have you taken any kind of vacation in B.C. for one night or longer?

	Total Sample	Interested in City Trip Vacations	
		Four	Five
Number of Respondents	957	234	279
Vacationed in B.C. one night or longer	51%	49%	47%
None	49	51	53
Mean number of trips	3.3	3.7	3.2

From the table above we see that nearly half the travellers who were extremely interested in city trips have been to B.C. for a vacation at least one night or longer, while more than half have never visited B.C. In this respect, people who were extremely interested in city trips were very much like the average traveller.

The table above also shows that the average traveller who has been to B.C. has been to B.C. an average of 3 times. Very much like the average traveller, travellers who were extremely interested in city trips have been to B.C. approximately three times in the past.

The level of interest in a B.C. vacation displayed by these travellers also needs to be examined in order to determine the percentage share B.C. commands as a potential for city trips.

Table XI: Interest in A Vacation in B.C.

Q46. How interested are you in taking a vacation of any kind, lasting one night or longer, in British Columbia?

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	937	229	268
Not at all interested	10%	9%	9%
2	7	9	5
3	21	20	15
4	23	24	18
Extremely Interested	39	38	53

Over half the travellers who were extremely interested in city trip vacations stated that they would be extremely interested in coming to B.C. on a holiday, making this a strong potential group for travel to B.C.

Only a small percentage (9%) of the respondents in the same category were not at all interested in B.C. as a destination.

E. SPECIFIC PRODUCT PREFERENCES

In this section, we will look at the specific activities that travellers would be able to undertake while on city trips. The cost that travellers were willing to incur to be able to take such a vacation was also examined. All tables presented in this section are based on quotas that have been created to provide an adequate sample for each vacation option.

Respondents who indicated they were interested in city trips were asked to state what they would be willing to pay for such a trip. In Table XII, the average for each city sampled is presented.

Table XII: Average Cost Per Day For City Trip

Q10a. How much per day would you be willing to pay for a city trip?

	Number of Respondents	Mean Amount Per Day
Total Sample	209	$164
Seattle/ Portland	62	$135
San Francisco/ Los Angeles	79	$200
Dallas/ Chicago	68	$148

Respondents in the San Francisco/Los Angeles areas were willing to spend more than any of the other groups, on average, per day for city trips. On the other hand, people sampled in the Seattle/Portland area were willing to spend less than average on this type of vacation.

Interestingly, the amount respondents were willing to spend on vacations differed according to age. Younger people were willing to spend less on their vacations than the older respondents.

On average, these travellers indicated that they would be willing to travel fifteen hours to get to their vacation destinations. The majority of the respondents stated that there was a greater likelihood that they would travel by air. These results can be see in the next two tables.

Table XIII: Maximum Number of Hours Willing To Travel

		Interested in City Trip Vacations					
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	209	29	33	40	34	38	35
Mean number of hours	15	11	18	17	13	14	16

Table XIV: Travel by Air or Car

		Interested in City Trip Vacations					
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	200	23	32	40	34	38	33
Air	74	78	63	90	77	55	82
Car	23	22	34	10	18	37	18
Other	3	00	3	0	5	8	0

We see that travellers from Portland and San Francisco would be willing to travel the furthest on city trips, slightly further than the average traveller would be willing to travel. On the other hand, travellers from the Seattle sample indicated that they would not be willing to travel as far, averaging only 11 hours.

Travellers from San Francisco showed an overwhelming preference for air travel, with nine out of ten people saying they would fly. Similarly, travellers from Chicago, Seattle and Los Angeles would more than likely travel by air to get to their destinations.

While the majority of the travellers from Portland and Dallas would want to travel by air, we see that over a third of the people in this sample would drive on city trips. In this respect, they were unlike the average traveller.

If these were their major vacations for the year, travellers stated that they would stay away from home an average of thirteen nights. People interviewed in San Francisco and Portland would be willing to stay away the longest. On the other hand, people from the Seattle, Dallas and Chicago indicated that on average, they would return home sooner.

Table XV: Average Number of Nights Away From Home

		Interested in City Trip Vacations					
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	221	31	34	44	35	41	36
Mean number of nights	13	11	14	15	13	11	11

Travellers were also asked to indicate the level of luxury they wanted while on this vacation and the breakdown is shown in the next table.

Table XVI: Degree of Luxury Wanted for this Vacation

		Interested in City Trip Vacations					
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	231	34	36	46	36	42	37
The most luxurious	9%	0%	0%	13%	19%	7%	13%
First Class	24	21	22	28	28	24	22
Middle Range	52	56	56	44	42	57	57
Basic Accommodation	13	21	22	13	8	10	8
Other/Depends	2	2	0	2	3	2	0

The majority of respondents sampled in Seattle/Portland and Dallas/Chicago stated a preference for middle-range accommodations. This was also true for a substantial portion of the San Francisco/Los Angeles sample.

However, we also see that there is a higher than average preference for the most luxurious accommodations among the travellers from Los Angeles, with 19% wanting the best in luxury. This is also true of travellers from San Francisco and Chicago, with 13% each in showing a preference for the finest accommodations.

Looking at the Los Angeles and Chicago samples, we also see that travellers from these cities show a less than average preference for basic accommodations, indicating that they would want a better class of accommodations. Two out of ten travellers from Portland and Seattle, on the other hand, would want basic accommodations.

For respondents who were going on city trip vacations, the average size of the travelling party was three people.

In the next series of questions, respondents were asked to rate their level of interest in activities that might be a part of their vacations. The following tables show the level of interest respondents have for each, as a part of their city trips.

Table XVII: Interest in Shopping

Q15. How interested would you be in the following activities that you might do on a city vacation: Shopping.

		Interested in Shopping	
	Total Sample	Four	Five
Number of Respondents	969	50	68
Seattle	17%	14%	15%
Portland	17	14	18
San Francisco	16	22	21
Los Angeles	16	14	20
Dallas	17	20	13
Chicago	17	16	13

We can see that out of the people who indicated they were extremely interested in a city trip vacation, the biggest percentage who would go shopping came from the San Francisco and Los Angeles samples. Looking at travellers from these two samples within the extremely interested category, we see that they show a higher than average preference for this activity.

Portland was the next largest group within the extremely interested category with 18% saying they were extremely interested going shopping while on a city trip, followed by Seattle with 15% responding similarly. Travellers from Dallas and Chicago, with only 13% from each city stating they were extremely interested in this activity, showed the least enthusiasm. If we look at the level of interest present for all activities, we see that travellers from these two cities have a less than average interest in this activity.
Women travellers interviewed were more interested in shopping than the males.

Table XVIII: Interest in Sightseeing

Q16. How interested would you be in the following activities that you might do on a city vacation: Sightseeing.

		Interested in Sightseeing	
	Total Sample	Four	Five
Number of Respondents	969	82	89
Seattle	17%	17%	11%
Portland	17	10	21
San Francisco	16	20	17
Los Angeles	16	15	18
Dallas	17	20	22
Chicago	17	18	11

Two out of ten travellers who were extremely interested in sightseeing while on vacation came from Dallas and Portland.

Travellers from San Francisco and Los Angeles made up the next largest group of people who were extremely interested in this vacation. The smallest percentage of travellers who were extremely interested came from Seattle and Chicago, with only 11% of the travellers who indicated extreme interest in sightseeing coming from each of these cities.

Table XIX: Interest in Visiting Heritage or Historic Sights

Q30. How interested would you be in the following activities that you might do on a city vacation: Visiting Heritage/Historic Sights.

		Interested in Visiting Heritage/Historical Sights	
	Total Sample	Four	Five
Number of Respondents	969	83	80
Seattle	17%	16%	15%
Portland	17	13	21
San Francisco	16	17	16
Los Angeles	16	16	16
Dallas	17	20	22
Chicago	17	18	10

Two out of ten travellers who were interested in visiting heritage sights were from each of two cities, Portland and Dallas. Compared to the average traveller, the travellers from these two cities that opted for city trips in general would be more likely to go participate in it.

Travellers from San Francisco and Los Angeles made up the next largest percentage of people who were extremely interested in visiting heritage sights. This was followed closely by travellers in Seattle. The smallest percentage of travellers who were extremely interested in this activity came from Chicago, with only one out of ten respondents indicating this rating.

Table XX: Interest in Cultural Activities

Q31. How interested would you be in the following activities that you might do on a city vacation: Cultural Activities.

		Interested in Cultural Activities	
	Total Sample	Four	Five
Number of Respondents	969	61	120
Seattle	17%	13%	16%
Portland	17	18	16
San Francisco	16	23	19
Los Angeles	16	10	21
Dallas	17	23	13
Chicago	17	13	15

The number of respondents who stated that they were extremely interested in cultural activities made up the biggest subsample of travellers who would take city trips.

Two out of ten travellers who were extremely interested in cultural activities were from Los Angeles.

The second largest group of people came from San Francisco, with 19% of the sample, followed by Seattle and Portland with 16% each. The smallest percentage of people who were interested in cultural activities came from Dallas, with only 13% stating they were extremely interested.

There was a greater likelihood that the females interviewed would take part in cultural activities than the males.

Table XXI: Interest in Special events or Shows

Q32. How interested would you be in the following activities that you might do on a city vacation: Special events or Shows.

	Total Sample	Interested in Special Events or Shows: Four	Interested in Special Events or Shows: Five
Number of Respondents	969	82	68
Seattle	17%	11%	13%
Portland	17	13	13
San Francisco	16	21	22
Los Angeles	16	17	16
Dallas	17	20	21
Chicago	17	18	15

Out of the total number of travellers who were extremely interested in special events, the largest percentage was from San Francisco, making up 22% of the sample. This was closely followed by travellers from Dallas.

The next group of travellers who were extremely interested in this vacation option came from Los Angeles, with 16% showing extreme interest, followed closely by travellers from Chicago.

The smallest number of travellers who were extremely interested in special events or shows came from Seattle and Portland, accounting for only 13% of the sample each.

Interestingly, this type of activity held more appeal to the younger travellers than to the older people. All the respondents under twenty-five indicated some level of interest in this activity, while less than a third of those over sixty-five were interested.

Table XXII: Interest in Visiting Gardens

Q33. How interested would you be in the following activities that you might do on a city vacation: Visiting Gardens.

		Interested in Visiting Gardens	
	Total Sample	Four	Five
Number of Respondents	969	48	41
Seattle	17%	15%	15%
Portland	17	24	26
San Francisco	16	17	27
Los Angeles	16	15	10
Dallas	17	12	15
Chicago	17	17	7

When considering the number of travellers who were interested in visiting gardens, we need to keep in mind that these respondents form the smallest group of travellers in the entire sample for city trips.

The largest percentage of people who were extremely interested in visiting gardens were from San Francisco and Portland, each making up approximately a quarter of this category.

This was followed by travellers from Seattle and Dallas, who accounted for 15% of the people who said they were extremely interested in visiting gardens. Travellers from Los Angeles and Chicago made up the smallest number of respondents who were extremely interested in this activity (with 10% and 7% respectively).

In Table XXIII, we see the level of interest respondents displayed for each of the activities discussed above.

Table XXIII: Mean Levels of Interest in Specific Activities

	Interested in City Trip Vacations
	Total Sample
Number of Respondents	232
Cultural Activities	4.2
Sightseeing	4.0
Visiting Heritage or Historic Sights	3.9
Special Events or Shows	3.8
Shopping	3.5
Visiting Gardens	3.1

Of all the city trip activities presented to the respondents, we see that Cultural Activities was the first choice of travellers who were interested in city trips, with a mean of 4.2 out of 5. This was followed closely by Sightseeing, which had a mean of 4.0.

Visiting Heritage or Historic Sights and Special Events and Shows were third and fourth in level of interest with means of 3.9 and 3.8 respectively. Shopping was in fifth place with a mean of 3.5. Visiting Gardens was ranked lowest in the scale as an activity of interest, with a mean of 3.1.

A final question asked respondents if there were any other activities they would like to partake in while on a city trip. The results are shown in Table XXIV.

Table XXIV: Other Vacation Activities of Interest

Q21. Is there any other type of vacation activities in particular that would interest you more than any of the ones that I have just mentioned?

	Total Sample	Seattle	Portland	S.F.	L.A.	Dallas	Chic.
Number of Respondents	92	12	17	20	9	18	16
Dining	16%	17%	12%	25%	33%	11%	6%
Cruises	10	8	6	20	0	17	0
Other Sports	9	8	0	15	0	6	18
Meet People/ Learn Their Culture	8	17	18	0	0	11	0
Beaches	5	8	0	0	0	17	6
Touring/ Sightseeing/ Exploring	5	0	6	15	11	0	0
Gambling	5	8	12	0	11	6	0
Other Water Sports	4	0	6	0	0	6	13
Religious Activities	4	0	6	10	11	0	0
Other	4	0	0	10	11	6	0
Golf	3	8	0	5	0	6	0
Skiing/Cross Country	3	8	6	0	11	0	0
Historical/ Arch. Sites	3	0	12	0	11	0	0
Relax/Rest	3	0	0	0	0	0	19
Fishing	2	8	0	0	0	6	0

	Total Sample	Seattle	Portland	S.F.	L.A.	Dallas	Chic.
Visiting Fam/Friends	2	8	6	0	0	0	0
Shopping	2	0	6	0	0	6	0
Music/Enter.	2	0	0	0	0	0	13
Swimming/ Snorkling/ Scuba Div.	1	0	0	0	0	0	6
Bicycling	1	0	6	0	0	0	0
Horseback Riding	1	0	0	0	0	0	6
Tennis	1	0	0	0	0	0	6
Museums/ Gall. Cult	1	0	0	0	0	0	6
Family/Kids Activities	1	0	0	0	0	6	0

When asked if there were other activities that were of interest to the respondents, only a small number responded. The activity that was the most popular mention was dining, which made up 16% of this sample. Cruises were the second most popular other activity with 10% mentioning this. This was followed closely by other sports which accounted for 9% of the responses.

F. MEDIA FACTORS

The effectiveness of present advertising strategies was evaluated through a series of questions that pertained to advertising for B.C. Questions were also asked of travellers to help determine the advertising media that would be the most helpful in communicating the city trip message to them.

Travellers were asked if they had heard the slogan ("Super, Natural") associated with a vacation destination, and we see these results in Table XXV.

Table XXV: "Super, Natural" Associated with a Vacation Destination

Q43a. Have you ever heard the slogan "Super, Natural" associated with a vacation destination?

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	951	234	278
Yes	12%	14%	10%
Yes, If mentioned B.C.	8	6	9
No	80	80	81

The slogan "Super, Natural" was unfamiliar to eight out of ten people surveyed in the entire sample. The same percentage of people who were extremely interested in city trips was unable to relate the slogan to any destination.

This slogan was known to only two in ten people who were very interested in city trips, including one in ten who volunteered that this slogan pertained to B.C.

Travellers who had heard the slogan "Super, Natural" but had not previously associated it with B.C. were asked the next question.

Table XXVI: "Super, Natural" Associated with B.C.

Q43b. Have you heard the slogan ("Super, Natural") associated with British Columbia?

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	923	227	268
Yes	18%	19%	17%
No	74	74	72
Other	0	0	1
Yes, If mentioned B.C.	8	7	10

Presenting the respondents with both the name (British Columbia) and the slogan ("Super, Natural") made only a small difference to the number of people who had heard of the slogan. Nearly three-fourths of the travellers who were extremely interested in city trips still had not heard of the slogan.

The advertising promoting Canada as a vacation destination seems to be more effective as eight out of ten travellers interested in city trips had heard or seen these promotions.

Compared to this, only six out of ten travellers had any knowledge of advertising about B.C. The details of these findings can be seen in Tables XXVII and XXVIII.

Table XXVII: Advertising for Canada as a Vacation Destination

Q51. Have you seen or heard any advertising for Canada as a vacation destination during the past year?

	Total Sample	Interested in City Trip Vacations	
		Four	Five
Number of Respondents	948	231	279
Yes	81%	83%	82%
No	19	17	18

Table XXVIII: Advertising for B.C. as a Vacation Destination

Q52. Have you seen or heard any advertising for B.C. as a destination during the past year?

	Total Sample	Interested in City Trip Vacations	
		Four	Five
Number of Respondents	922	223	270
Yes	62%	61%	62%
No	38	39	38

We note that four out of ten travellers have never seen or heard any advertising for B.C. during the past year. This constitutes the potential market of travellers who need to be reached by the advertising.

The next series of questions dealt with different means of getting information across to the travellers. The ratings are based on a 5 point scale, with 1 being not at all useful and 5 being extremely useful.

Table XXIX: Brochures as a Source of Information

Q58. How useful do you find the following as a source of information when you are planning a vacation?: Brochures

	Total Sample	Interested in City Trip Vacations	
		Four	Five
Number of Respondents	964	237	283
Not at all useful	8%	5%	5%
2	11	11	7
3	27	30	27
4	28	35	24
Extremely Useful	26	19	37

Brochures were an extremely useful source of information for 37% of the travellers who rated city trips very highly and 24 percent of the travellers in this category found brochures to be a useful source of information.

Only a small number of (12%) these travellers stated they had little or no use at all for brochures.

Table XXX: Usefulness of Radio and Television Advertising

Q59. How useful do you find the following as a source of information when you are planning a vacation?: Radio and television advertising.

	Total Sample	Interested in City Trip Vacations	
		Four	Five
Number of Respondents	964	237	281
Not at all useful	27%	22%	27%
2	27	29	19
3	27	28	31
4	11	14	13
Extremely Useful	8	7	10

Radio and television advertising is perceived by travellers to be a less effective advertising tool than brochures. Only 23% of the travellers who were extremely interested in city trips felt that this was a useful method of getting the information across, while 46% felt that this was of little or no use at all.

In the next question, respondents were asked how useful they found newspaper and magazine articles. Travellers who were extremely interested in city trips felt that newspaper and magazine articles were useful in planning their vacations. This method of advertising was more favourably received than radio and television advertising.

Table XXXI: Usefulness of Newspaper and Magazine Articles

Q60. How useful do you find the following as a source of information when you are planning a vacation?: Newspaper and magazine articles and advertising.

		Interested in City Trip Vacations	
	Total Sample	Four	Five
Number of Respondents	962	237	279
Not at all useful	8%	7%	7%
2	11	10	9
3	28	29	26
4	29	34	25
Extremely Useful	24	20	33

Travel agents or tour operators are another good source of information on city trips. In the group of travellers who were extremely interested in city trips, 58% felt that travel agents were useful to some extent, while 23% felt they were not useful.

Table XXXII: Usefulness of Travel Agents or Tour Operators

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Travel agents or tour operators.

	Total Sample	Interested in City Trip Vacations: Four	Interested in City Trip Vacations: Five
Number of Respondents	962	235	282
Not at all useful	15%	12%	11%
2	13	14	12
3	23	24	19
4	24	25	22
Extremely Useful	25	24	36

Finally, travellers were asked to rate how useful friends and relatives were as a source of information. This was a useful source of information to two-thirds of the respondents who were extremely interested in taking city trips, while only 15% found this source of little use.

Table XXXIII: Usefulness of Friends and Relatives

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Friends or relatives.

	Total Sample	Interested in City Trip Vacations: Four	Interested in City Trip Vacations: Five
Number of Respondents	964	236	282
Not at all useful	10%	7%	9%
2	8	9	6
3	19	20	16
4	27	30	25
Extremely Useful	36	34	44

The overall mean for each medium as a useful source of information to people who are extremely interested in a resort vacation is presented in the table below.

Table XXXIV: Mean For Each Medium as a Useful Source of Information

	Interested in City Trip Vacations
	Total Sample
Number of Respondents	282
Friends & Relatives	3.9
Brochures	3.8
Newspapers & Magazines	3.7
Travel Agents & Tour Operators	3.6
Radio & Television	2.6

Travellers who were extremely interested in city trips found the information that they received from friends and relatives to be the most helpful when planning their vacations, with a mean of 3.9 out of 5.0. Brochures were rated as a close second most useful source of information, with a mean of 3.8.

This was closely followed by newspapers and magazine articles in third place with a mean of 3.7. The information received from travel agents and tour operators came in fourth with a mean rating of 3.6.

The least useful source of information to travellers extremely interested in city trips was advertising seen or heard on radio and television, which only received a rating of 2.6.

G. MARKETING IMPLICATIONS

City trips are a popular form of vacation travel, for which marketing efforts can be tailored and made effective by utilising the results of this survey.

The potential market for B.C. city trips in these U.S. centres is some 15 percent of the residents who travel internationally, or some 514,000 travellers over the next few years. San Francisco and Los Angeles represent the source of the largest numbers of these visitors. Travellers from San Francisco and Los Angeles are also willing to spend the most on city trips, at about $200 per day.

The target market for city trips is strongly influenced by female decision-makers. These potential visitors are from all age groups and their past travel has been much like that of other travellers. The cluster analysis reveals that the best prospects for city trips are Affluent Urban Singles and Young Urban Educated Singles, both large groups. These people expect to travel by air. Their current knowledge of B.C. is very limited.

Product preferences among city trip vacationers tend to favour cultural activities, sightseeing and visiting heritage or historic sights. Special events are favoured by young travellers and were followed in preference by shopping which attracts more women. Visiting gardens was rated lowest but still attracted a substantial amount of interest among potential city trip travellers.

Media selection, if determined solely by our respondents and their perceptions, would use word-of-mouth, brochures, articles in newspapers and magazines, as well as the recommendations of travel agents and tour operators. Purely advertising media, such as radio and television, are given less credit for providing travellers with information than is probably the case in actual fact. Survey research frequently finds that consumers are not always accurate in recalling where they get their information about many products and services they buy.

Advertising and promotion strategies, in our view, should be directed at significantly increasing the awareness of B.C. as a vacation destination for city trips. Eight out of every ten travellers who are interested in city trips cannot recall the "Super, Natural" slogan and more than one-third say they have not seen or heard any advertising for B.C. in the past year. Over half have never taken any kind of vacation in B.C. and one-fourth say they know "nothing at all" about B.C. as a vacation destination.

APPENDIX

CLUS. :R 7

Affluent Urban Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	37.6	19.9	189
White Collar	74.7	53.4	140
Blue Collar	15.2	30.9	49
Unskilled	2.1	5.0	42
HOUSEHOLD COMPOSITION			
Female Householder	33.9	24.3	140
Black Householder	7.4	10.5	70
Spanish Householder	4.6	4.7	98
Asian Householder	4.0	1.0	400
Householder Age 65+	17.1	21.4	80
Married Couples	41.1	58.5	70
Households w/ Children	22.4	41.0	55
Two Workers	57.7	52.8	109
SESI	77	48	160
INCOME			
Income 0 to 25K	13.9	39.4	35
Income 25K+ to 50K	68.4	45.0	152
Income 50K+ to 75K	15.3	12.5	122
Income 75K+	2.4	3.1	77
Median HH Income	$29,715	$24,533	122
HOUSING			
Single Family Homes	44.6	81.2	55
Multi-Family Homes	55.4	18.8	295

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	28.5	35.0	81
Some College	20.8	14.6	142
College Graduate	33.0	14.1	234
Median # Years Comp.	13.8	12.2	113
AGE DISTRIBUTION			
Age 0-5 Years	2.9	4.1	71
Age 0-17 Years	8.9	15.5	57
Age 18-34 Years	20.9	27.4	76
Age 35-54 Years	9.2	13.0	71
Age 55-64 Years	6.4	8.8	73
Age 65+ Years	8.0	11.2	71
Median Age in Years	39.6	40.0	99
LENGTH OF RESIDENCE (in Years)	5.3	8.0	66

1988 U.S. HOUSING POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,970,383	90,328,747	3.3
Adult Population	5,232,446	181,649,997	2.9

CLUSTE.. 7

PRODUCT PREFERENCES

FINANCIAL SERVICES

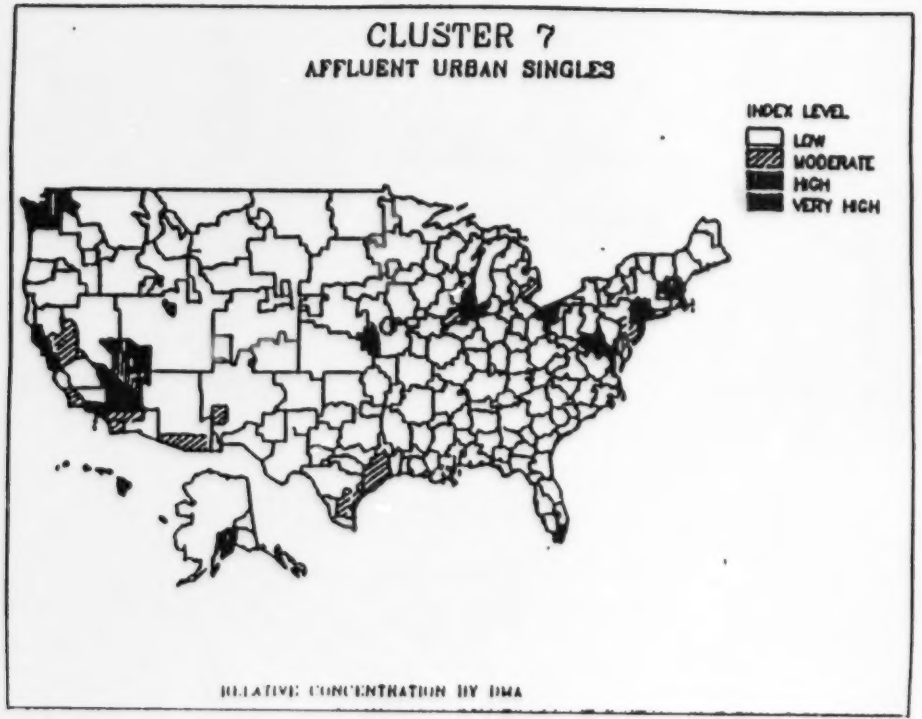
American Express Gold Card
Investment Property
Travel/Entertainment Cards
Brokerage Accounts
Insured Money Market Accounts
Temporary Insurance
Mutual Fund
Common Stock
IRA
Interest Bearing Checking Accounts

LEISURE PURSUITS

Domestic Travel
Snow Skiing
Attend Horse Races
Foreign Travel
Photography
Golf
Camping
Live Theatre/Concerts
Attend Pro Sports Events
Frequently Attend Movies

SPENDING HABITS

Gourmet Ice Cream
Discount Airlines
Imported Beers
Imported Whiskey
Frozen Yogurt
Lowfat Milk
Diet Soft Drinks
Imported Cars
Bottled Water
Imported White Wines



CLUSTER 10

Young Professionals

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	36.8	19.9	185
White Collar	69.2	53.4	130
Blue Collar	17.6	30.9	57
Unskilled	2.4	5.0	48
HOUSEHOLD COMPOSITION			
Female Householder	30.9	24.3	127
Black Householder	4.5	10.5	43
Spanish Householder	2.9	4.7	62
Asian Householder	1.9	1.0	190
Householder Age 65+	17.5	21.4	82
Married Couples	46.4	58.5	79
Households w/ Children	27.0	41.0	66
Two Workers	59.9	52.8	113
SESI	72	48	150
INCOME			
Income 0 to 25K	22.3	39.4	57
Income 25 to 50K	64.7	45.0	144
Income 50 to 75K	11.6	12.5	93
Income 75K+	1.4	3.1	45
Median HH Income	$26,950	$24,533	110
HOUSING			
Single Family Homes	70.7	81.2	87
Multi-Family Homes	29.3	18.8	156

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	24.8	35.0	71
Some College	21.9	14.6	150
College Graduate	36.6	14.1	260
Median # Years Comp.	14.1	12.2	116
AGE DISTRIBUTION			
Age 0-5 Years	3.7	4.1	90
Age 0-17 Years	11.5	15.5	74
Age 18-34 Years	25.3	27.4	92
Age 35-54 Years	12.0	13.0	92
Age 55-64 Years	6.7	8.8	76
Age 65+ Years	9.2	11.2	82
Median Age in Years	35.5	40.0	89
LENGTH OF RESIDENCE (in Years)	4.9	8.0	61

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	1,375,287	90,328,747	1.5
Adult Population	2,590,603	181,649,997	1.4

CLUSTER 10

PRODUCT PREFERENCES

FINANCIAL SERVICES

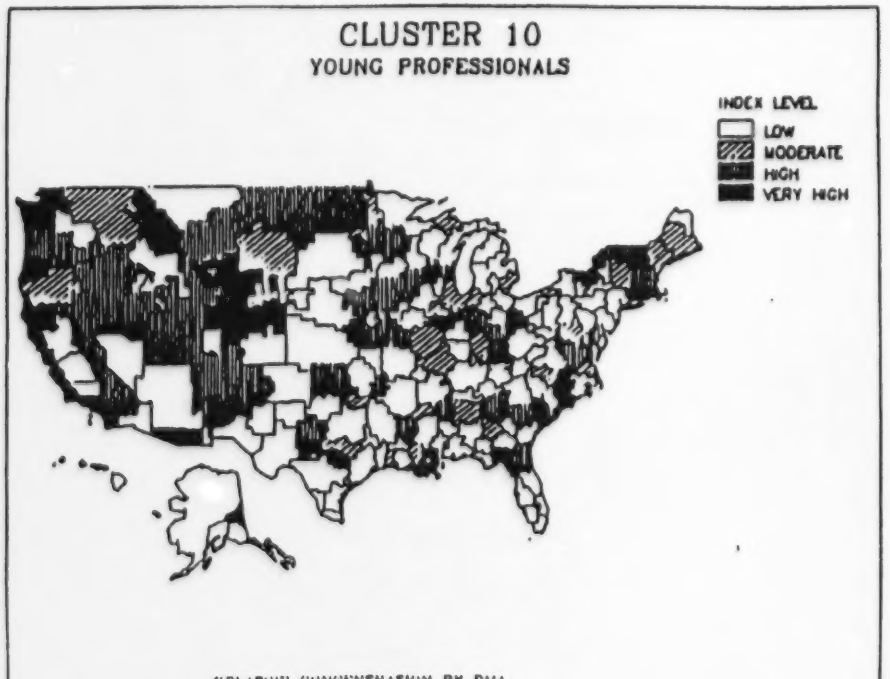
Mutual Funds
Second Mortgage/Home Equity Loans
Auto Loan - New Car
American Express Gold Card
Insured Money Market Account
Prepaid Health Program
Temporary Insurance
Home Improvement Loans
Long Term Savings Certificate
Accounting Services

LEISURE PURSUITS

Snow Skiing
Camping
Jogging
Golf
Live Theatre/Concerts
Bicycling
Domestic Travel
Public Issue Involvement
Frequently Attend Movies
Tennis

SPENDING HABITS

Imported Beers
Gourmet Foods
Diet Soft Drinks
Frozen Yogurts
Upscale Cosmetics
Paperback Books
Jewelry
Imported Cars
Bottled Water
Domestic White Wine



CLUSTER 12

Highly Mobile Working Couples

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	26.3	19.9	132
White Collar	63.2	53.4	118
Blue Collar	24.2	30.9	78
Unskilled	3.2	5.0	64
HOUSEHOLD COMPOSITION			
Female Householder	17.7	24.3	73
Black Householder	5.0	10.5	47
Spanish Householder	4.0	4.7	85
Asian Householder	2.0	1.0	200
Householder Age 65+	6.5	21.4	30
Married Couples	65.5	58.5	112
Households w/ Children	49.4	41.0	120
Two Workers	62.1	52.8	118
SESI	68	48	142
INCOME			
Income 0 to 25K	14.2	39.4	36
Income 25K+ to 50K	67.1	45.0	149
Income 50K+ to 75K	16.9	12.5	135
Income 75K+	1.8	3.1	58
Median HH Income	$29,920	$24,533	122
HOUSING			
Single Family Homes	78.7	81.2	97
Multi-Family Homes	21.3	18.8	113

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	35.3	35.0	101
Some College	23.0	14.6	158
College Graduate	22.5	14.1	160
Median # Years Comp.	12.9	12.2	106
AGE DISTRIBUTION			
Age 0 to 5 Years	6.2	4.1	151
Age 0 to 17 Years	19.2	15.5	124
Age 18 to 34 Years	35.9	27.4	131
Age 35 to 54 Years	17.2	13.0	132
Age 55 to 64 Years	6.6	8.8	75
Age 65+ Years	6.1	11.2	54
Median Age in Years	32.7	40.0	82
LENGTH OF RESIDENCE (In Years)	4.1	8.0	51

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	3,471,871	90,328,747	3.8
Adult Population	6,936,753	181,649,997	3.8

CLUSTER 12

PRODUCT PREFERENCES

FINANCIAL SERVICES

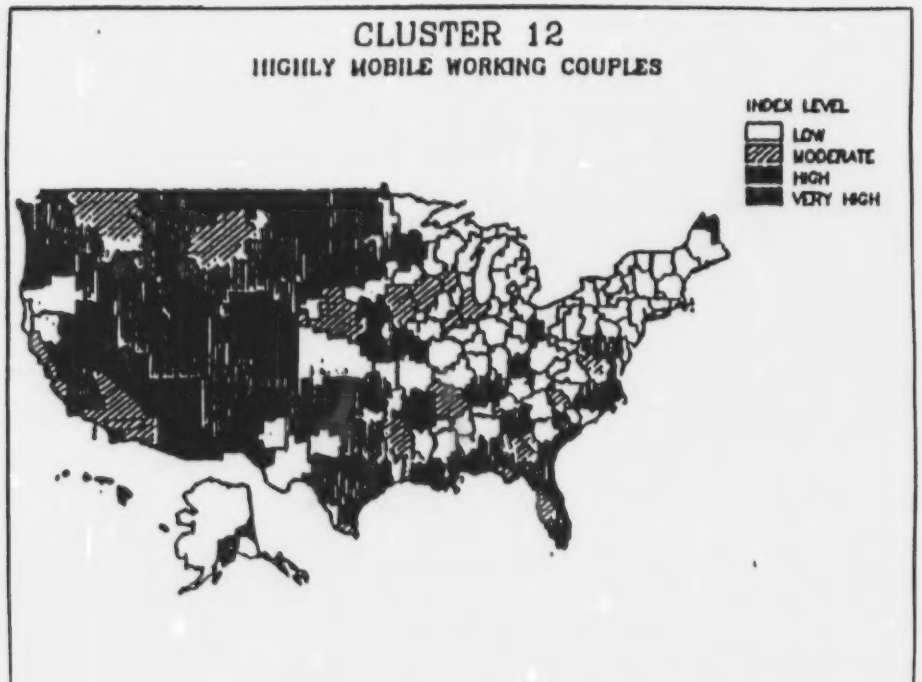
Common Stock
Investment Property
Line of Credit Account
Auto Loan - New Car
Higher Value Life Insurance
Travel/Entertainment Cards
Frequent Stock Transactions
Disability Insurance
Personal Loan (s) - Not for Education
Department Store Credit Cards

LEISURE PURSUITS

Racquet Ball
Golf
Domestic Travel
Tennis
Snow Skiing
Attend Pro Sports Events
Camping
Bicycling
Bowling
Public Issue Involvement

SPENDING HABITS

Imported Beers
Wine Coolers
Mexican Food Ingredients
Soft Drinks (Diet/Regular)
Imported Cars
Imported Wines
Jewelry
Clothing Expenditures
Merchandise by Mail/Phone



CLUSTER 17

Young Urban Educated Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	33.5	19.9	168
White Collar	71.7	53.4	134
Blue Collar	15.4	30.9	50
Unskilled	2.3	5.0	46
HOUSEHOLD COMPOSITION			
Female Householder	33.0	24.3	136
Black Householder	5.7	10.5	54
Spanish Householder	3.7	4.7	79
Asian Householder	2.8	1.0	280
Householder Age 65+	8.5	21.4	40
Married Couples	29.3	58.5	50
Households w/ Children	17.1	41.0	42
Two Workers	59.8	52.8	113
SESI	68	48	142
INCOME			
Income 0 to 25K	41.5	39.4	105
Income 25K+ to 50K	51.9	45.0	115
Income 50K+ to 75K	5.9	12.5	47
Income 75K+	0.7	3.1	23
Median HH Income	$21,912	$24,533	89
HOUSING			
Single Family Homes	43.9	81.2	54
Multi-Family Homes	56.1	18.8	298

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	21.6	35.0	62
Some College	22.3	14.6	153
College Graduate	39.7	14.1	282
Median # Years Comp.	14.0	12.2	115
AGE DISTRIBUTION			
Age 0 to 5 Years	2.4	4.1	59
Age 0 to 17 Years	6.3	15.5	41
Age 18 to 34 Years	23.4	27.4	85
Age 35 to 54 Years	9.2	13.0	71
Age 55 to 64 Years	3.9	8.8	44
Age 65+ Years	4.6	11.2	41
Median Age in Years	27.9	40.0	70
LENGTH OF RESIDENCE (In Years)	2.5	8.0	31

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	2,312,714	90,328,747	2.6
Adult Population	4,014,659	181,649,997	2.2

CLUSTER 17

PRODUCT PREFERENCES

FINANCIAL SERVICES

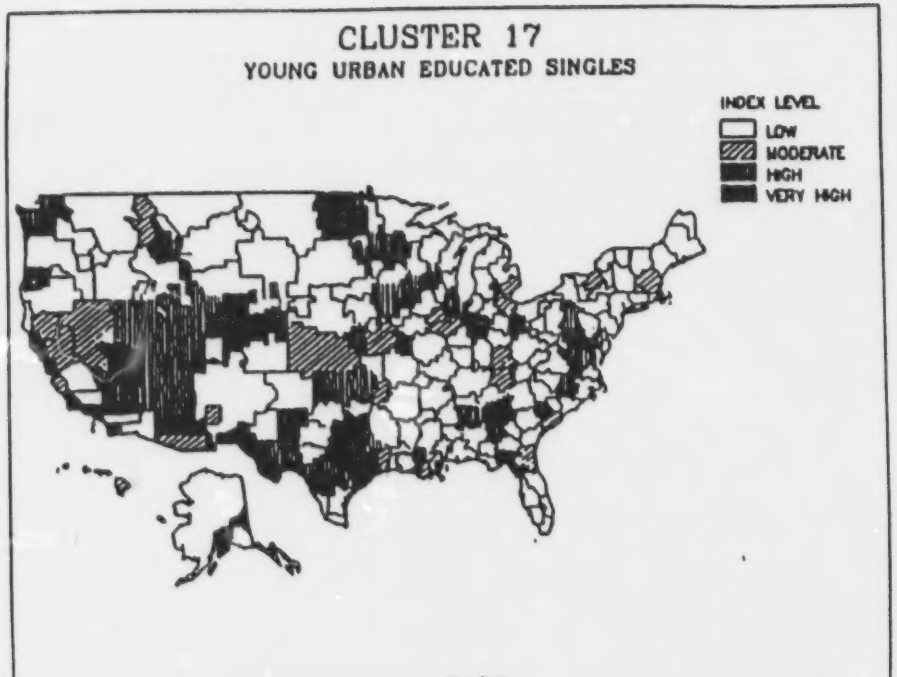
American Express Gold Card
Travelers Cheques
Visa Card
American Express Green Card
Temporary Insurance
Prepaid Health Program
Mutual Fund
Line of Credit Account
Non-Interest Bearing Checking Account

LEISURE PURSUITS

Snow Skiing
Water Skiing
Tennis
Racquet Ball
Frequent Foreign Travel
Jogging
Attend Movies Frequently
Live Theatre/Concerts
Prescribed Physical Fitness Programs
Camping
Bicycling

SPENDING HABITS

Imported Beers
Gourmet Ice Cream
Wine Coolers
Frozen Yogurt
Canned Soups - Single Serving
Diet Soft Drinks
Sports Equipment
Imported Cars
Clothing Expenditures



CLUSTER 24

Young Urban Ethnics

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	20.7	19.9	104
White Collar	56.1	53.4	105
Blue Collar	26.4	30.9	85
Unskilled	4.3	5.0	86
HOUSEHOLD COMPOSITION			
Female Householder	35.7	24.3	147
Black Householder	9.3	10.5	89
Spanish Householder	8.2	4.7	174
Asian Householder	3.8	1.0	380
Householder Age 65+	16.0	21.4	75
Married Couples	33.3	58.5	57
Households w/ Children	24.8	41.0	60
Two Workers	51.0	52.8	97
SESI	48	48	100
INCOME			
Income 0 to 25K	71.4	39.4	181
Income 25K+ to 50K	26.5	45.0	59
Income 50K+ to 75K	2.0	12.5	16
Income 75K+	0.1	3.1	3
Median HH Income	$17,328	$24,533	71
HOUSING			
Single Family Homes	43.6	81.2	54
Multi-Family Homes	56.4	18.8	300

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	31.9	35.0	91
Some College	19.5	14.6	133
College Graduate	16.8	14.1	119
Median # Years Comp.	12.3	12.2	101
AGE DISTRIBUTION			
Age 0 to 5 Years	2.9	4.1	70
Age 0 to 17 Years	8.0	15.5	52
Age 18 to 34 Years	20.6	27.4	75
Age 35 to 54 Years	8.4	13.0	65
Age 55 to 64 Years	4.6	8.8	52
Age 65+ Years	7.0	11.2	63
Median Age in Years	32.8	40.0	82
LENGTH OF RESIDENCE (in Years)	3.3	8.0	41

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,768,664	90,328,747	3.1
Adult Population	4,760,922	181,649,997	2.6

CLUSTER 24

PRODUCT PREFERENCES

FINANCIAL SERVICES

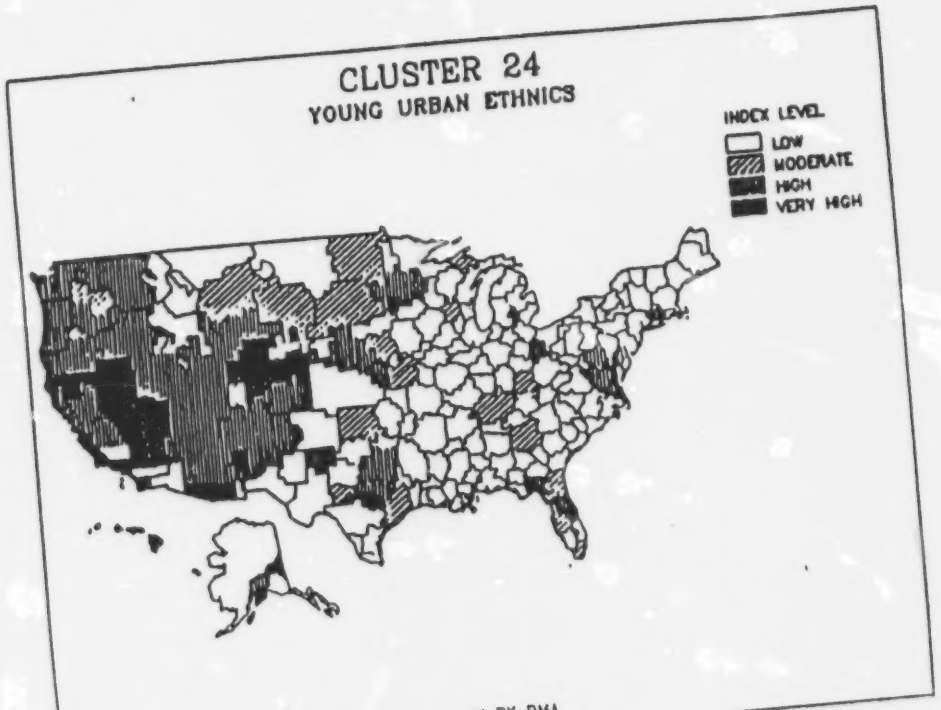
American Express Green Card
Temporary Insurance
Prepaid Health Program
Money Orders
Vision Care Insurance
Travelers Cheques

LEISURE PURSUITS

Snow Skiing
Attend Pro Sports Events
Travel to Mexico
Camping
Jogging
Attend Movies
Water Skiing
Racquet Ball
Bowling
Live Theatre/Concerts

SPENDING HABITS

Gourmet Ice Cream
Imported Beers
Health & Beauty Aids
Stereo Equipment
Records/Tapes
Frozen Yogurt
Wine Coolers
Gourmet Food Items



CLUSTER 25

Young Mobile Apartment Dwellers

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	17.6	19.9	88
White Collar	49.2	53.4	92
Blue Collar	33.5	30.9	108
Unskilled	5.0	5.0	100
HOUSEHOLD COMPOSITION			
Female Householder	29.2	24.3	120
Black Householder	4.4	10.5	42
Spanish Householder	3.7	4.7	79
Asian Householder	1.0	1.0	100
Householder Age 65+	20.4	21.4	95
Married Couples	50.4	58.5	86
Households w/ Children	32.3	41.0	79
Two Workers	52.7	52.8	100
SESI	45	48	94
INCOME			
Income 0 to 25K	58.7	39.4	149
Income 25K+ to 50K	37.5	45.0	83
Income 50K+ to 75K	3.6	12.5	29
Income 75K+	0.2	3.1	6
Median HH Income	$20,411	$24,533	83
HOUSING			
Single Family Homes	21.5	81.2	26
Multi-Family Homes	78.5	18.8	418

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	38.0	35.0	102
Some College	16.2	14.6	111
College Graduate	11.7	14.1	83
Median # Years Comp.	12.0	12.2	98
AGE DISTRIBUTION			
Age 0 to 5 Years	4.5	4.1	110
Age 0 to 17 Years	14.9	15.5	96
Age 18 to 34 Years	27.9	27.4	102
Age 35 to 54 Years	12.5	13.0	96
Age 55 to 64 Years	8.5	8.8	97
Age 65+ Years	12.9	11.2	115
Median Age in Years	37.0	40.0	93
LENGTH OF RESIDENCE (in Years)	6.1	8.0	76

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,494,365	90,328,747	2.8
Adult Population	4,643,898	181,649,997	2.6

CLUSTER

PRODUCT PREFERENCES

FINANCIAL SERVICES

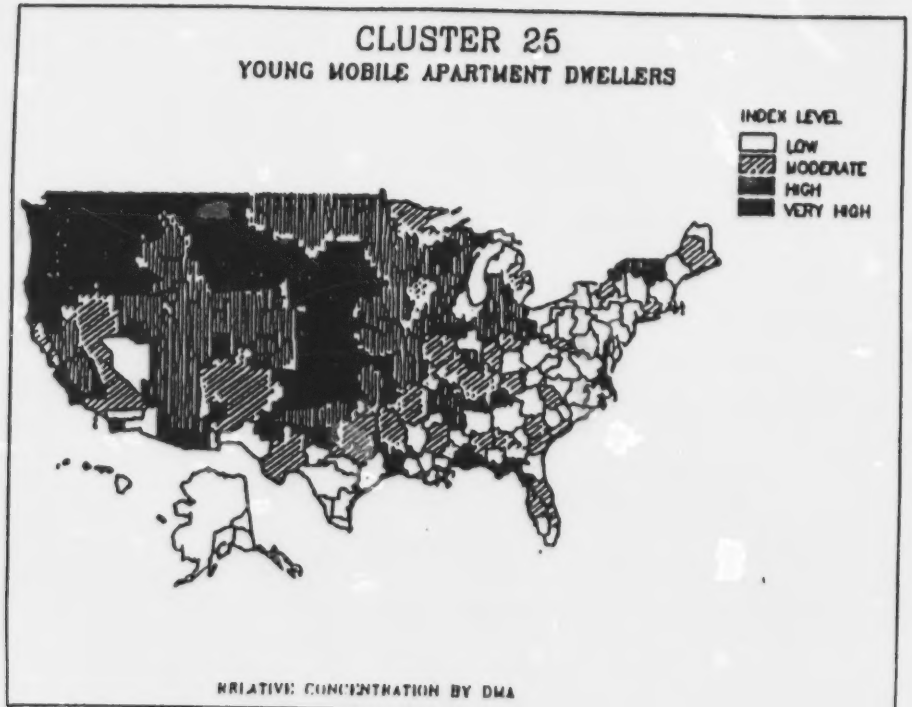
Medical/Healthcare Insurance - Medicare
Money Orders
Non-Interest Bearing Checking Accounts
Home Improvement Loans
Legal Services

LEISURE PURSUITS

Camping
Snow Skiing
Belong to Fraternal Order
Water Skiing
Fishing
Hunting
Public Issue Involvement

SPENDING HABITS

Health & Beauty Aids
Non Filter Cigarettes
Weight Watchers Products
Soft Drinks
Domestic Beers
Snack Candy
Clothing Expenditures
Imported Trucks



QUESTIONNAIRE

TOURISM - MARKET MATCH STUDY - #448

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY QUESTIONNAIRE

Hello, this is _____, calling from Gilmore Research, a national survey research company. We are conducting a survey (today/this evening) and your household has been selected.

We are interviewing people who have travelled outside the United States during the past three years or who plan to do so in the next two years. Is there anyone like that living in your household, who is also 25 years old or older?

NOTE: TRAVEL FOR BUSINESS OR PLEASURE IS ACCEPTABLE

IF NO, RECORD AND TERMINATE

IF YES, CONTINUE

Is there more than one person like that living in your household?

IF NO, ASK TO SPEAK TO THE PERSON WHO HAS OR IS PLANNING TO TRAVEL OUTSIDE THE US
CONTINUE AT "A"

IF YES, SAY:

Of those who have travelled outside the United States, I need to speak to [RANDOM: oldest/youngest] May I please speak to that person?

IF YES, CONTINUE AT "A"

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

A. REINTRODUCE IF SELECTED R IS NOT PERSON WHO ANSWERED THE PHONE

My questions will take 10 or 12 minutes, May I go ahead? Thank you.

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

PERSUADERS

We are not selling anything at all.

The topic of the interview is international travel; what you like to do and where you like to go.

It is very important that we speak to you. Your opinions represent many others and if we cannot interview every member of our sample, the accuracy of our data will be reduced.

This is a very important study, because it will be used to plan tourist activities.

I can't tell you who the sponsor of the study is right now, because it might influence the way you answer some questions. But I would be happy to tell you at the end of the interview.

Everything you say will be kept strictly confidential.

Q1. Have you taken a trip outside the United States, either for business or pleasure, during the past three years, or are you planning such a trip during the next two years?

1. YES | SKIP TO Q3

2. NO
3. DON'T KNOW
4. REFUSED

Q2. ASK IF Q1 EQ 2, 3 OR 4. Is there anyone else in your household, who is 25 or older, who has travelled outside the US during the past three years or is planning to do so during the next three years?

1. YES - ASK TO SPEAK TO THAT PERSON AND X-BACK TO A.

2. NO | SAY: I only need to talk to people
3. DON'T KNOW | who have or are planning to travel
4. REFUSED | outside the US, so those will be
| all my questions. Thank you for
| your time. TERMINATE AND X-BACK

Q3. Thinking of your major vacation travel to any location, what vacation destinations have you traveled to in the last three years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4. And what destinations do you have <u>firm</u> plans to visit during the next two years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4B. Have your travel plans changed in response to the war in the Persion Gulf?

1. YES
2. NO
3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q4C. ASK IF Q4B EQ 1. How have your travel plans changed?

1. POSTPONED/CANCELLED TRIP TO MIDEAST
2. POSTPONED/CANCELLED TRIP TO EUROPE
3. POSTPONED/CANCELLED OTHER TRIP OUTSIDE THE US/WILL TRAVEL ONLY IN THE US
4. POSTPONED/CANCELLED AIR TRAVEL/WILL NOT TRAVEL BY AIR
5. OTHER (SPECIFY - ONE FRAME)
6. DON'T KNOW
7. REFUSED

Next, I'd like you to think about a vacation you might take outside your home state. I'm going to read four general types of vacation you might take. Please rate each one on a scale of 1 to 5, where 1 means you would not be interested at all in that type of vacation, and 5 means you would be extremely interested.

First is:

RANDOM

Q5. A city trip, where you could shop, visit museums, enjoy entertainment, dine, attend plays or concerts or just stroll and enjoy the city. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q6. An outdoor adventure vacation in a natural area, where you could engage in activities such as camping, hunting, fishing, hiking or rafting. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q7. A resort vacation to a resort or a resort area where a wide variety of activities, such as beaches, skiing, golfing, tennis, horseback riding and so on, were available close by or on the premises. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NOT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q8. A touring vacation by car, bus, RV or train through areas of scenic beauty, cultural or general interest. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

*** DISPLAY SCREEN OF RESPONSES TO Q5-8.
*** INTERVIEWER: SELECT VACATION TYPE WHICH IS HIGHEST RATED, GIVEN QUOTAS

Next, I'd like to ask you some questions about a [RECOVER FROM DISPLAY SCREEN THE TYPE OF VACATION R FINDS MOST INTERESTING]. Remember that this is a vacation that you would take outside your home state.

Q10. How much per day would you be willing to pay for a [RECOVER VACATION TYPE FROM DISPLAY SCREEN], per person, excluding transportation costs?
FOR TOURING VACATION, DELETE "excluding transportation costs"

_____ DOLLARS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just take a guess?)
9999. REFUSED

Q11. Assuming that this vacation took outside the your home state, what is the maximum hours you would be willing to travel get to your destination?

____ HOURS (IF RANGE GIVEN, ENTER THE AVERAGE)

9996. NONE
9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q11B. ASK IF Q11 NE 9996, 9997, 9998,9999. Does this refer to travel by air or by car?

1. AIR
2. CAR
3. OTHER
4. DON'T KNOW
5. REFUSED

Q12. What would be the best length of vacation, in terms of number of nights away from home? Assume that this is your major vacation during the year.

____ NIGHTS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q13. What degree of luxury would you want for this vacation:

1. The most luxurious,
2. First class,
3. Middle range, or
4. Basic accommodation?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q14. If this were your major vacation during the year, how many people would there be in your travelling party, including yourself?

____ NUMBER (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just make an estimate?
9999. REFUSED

Next, I'm going to read a list of activities that you might do on a [RECOVER TYPE OF VACATION FROM DISPLAY FRAME]. Using the scale from 1 to 5, please tell me how interested you would be in each one.

(Remember that 1 means that you are not at all interested and 5 means that you are extremely interested.)

*** FOR CITY VACATIONS

RANDOM

Q15. Shopping (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q16. Sightseeing (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q17. Visiting heritage or historic sites. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q18. Cultural activities, like museums, theatre or opera. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q19. Special events or shows. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q20. Visiting gardens. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q21. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR TOURING VACATIONS

RANDOM

Q22. Guided or organized tours. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q23. Tours which stay mainly in cities. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q24. Tours which stay mainly in rural areas. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q25. Tours involving sports activities, like golf, tennis or fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q26. Tours involving outdoor activities, like hiking or nature walks. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q27. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR RESORT VACATIONS

RANDOM

Q28. Marine resorts (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q29. Fishing resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q30. Ski resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q31. Golf resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q32. Guest or dude ranches ranches. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q33. Health resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q34. Wilderness resorts which are not acccessible by automobile. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q35. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR OUTDOOR VACATIONS

RANDOM

Q36. Wildlife viewing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q37. Coastal cruising or boating. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q38. Hiking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q39. Whitewater canoeing or kayaking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q40. River rafting. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q41. Fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q42. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

Q42B. Would you prefer a vacation with guided activities, or without a guide?

1. GUIDED
2. SOME OF EACH/DEPENDS
3. UNGUIDED

4. OTHER
5. DON'T KNOW
6. REFUSED

Q43. Next, thinking of the [RECOVER VACATION TYPE FROM DISPLAY FRAME OR IF NO VACATION TYPE IS PREFERRED, SAY: your next major vacation], what are the three most attractive destinations that come to mind which are outside your home state?

ONE FRAME

Q43A. Have you ever heard the slogan "Super Natural" associated with a vacation destination?

1. YES
2. YES WITH MENTION OF BRITISH COLUMBIA
3. NO
4. OTHER
5. DON'T KNOW/NOT SURE/DON'T REMEMBER
6. REFUSED

Q43B. ASK IF Q43A EQ 1, 3-6. Have your ever heard this slogan (Super Natural) associated with British Columbia?

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q44. How much do you know about British Columbia as a destination for <u>any type</u> of vacation?

READ

1. A great deal,
2. A moderate amount,
3. A little, or
4. Nothing at all?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q45. How many times, if any, have you taken <u>any kind</u> of vacation in <u>British Columbia</u> for one night or longer?

____ NUMBER OF TIMES

9998. DON'T KNOW (ASK: What would be the approximate number of times?)

9999. REFUSED

Q46. On the scale of 1 to 5 (where 1 means not at all interested and 5 means extremely interested), how interested are you in taking a vacation <u>of any kind</u>, lasting one night or longer, in British Columbia?

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW | SKIP
7. REFUSED | TO Q48

Q47. ASK IF Q 46 EQ 1-5. Why did you rate your interest in a British Columbia vacation at a [RECOVER SCORE FROM Q47]? PROBE AND CLARIFY

THREE FRAMES

Q47B. Has Canada become a more attractive destination to you, in the light of the war in the Persian Gulf, or not?

1. HAS BECOME MORE ATTRACTIVE
2. HAS NOT BECOME MORE ATTRACTIVE

3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q47C. ASK IF Q47B EQ 1 OR 2. What are your major reasons for saying that?

THREE FRAMES

Now for a different type of question. During the past year, please tell me if you have seen or heard any advertising for each of the following places as a vacation destination.

RANDOM

Q48. Hawaii. (Have you seen or heard any advertising for Hawaii as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q49. Australia. (Have you seen or heard any advertising for Australia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q50. Alaska. (Have you seen or heard any advertising for Alaska as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q51. Canada. (Have you seen or heard any advertising for Canada as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q52. British Columbia. (Have you seen or heard any advertising for British Columbia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q53. Alberta. (Have you seen or heard any advertising for Alberta as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q54. Ontario. (Have you seen or heard any advertising for Ontario as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q55. Colorado. (Have you seen or heard any advertising for Colorado as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

END RANDOM

On a scale of 1 to 5, how useful do you find each of the following as a source of information when you are planning a vacation, where 1 means not at all useful and 5 means extremely useful?

RANDOM

Q58. Brochures.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q59. Radio and television advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q60. Newspaper and magazine articles and advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q62. Travel agents or tour operators.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q63. Friends or relatives.
(How useful do you find this source of information , on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

END RANDOM

Q64. Finally, just a few questions about yourself to help us classify our data. First, who makes the major travel decisions in your household:

1. The male head of household,
2. The female head of household,
3. Both together, or
4. Someone else?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q65. Into which age category may I place you?

1. Under 25,
2. 25 to 34,
3. 35 to 44,
4. 45 to 54,
5. 55 to 64, or
6. 65 and over.

Q66. What is your full nine-digit zip code?

IF R DOES NOT KNOW ALL NINE DIGITS, CODE FIRST FIVE DIGITS TO THE LEFT OF THE DASH.

_ _ _ _ _ - _ _ _ _ ENTER CODE

99998. DON'T KNOW
99999. REFUSED

Q67. ASK ONLY IF R DID NOT SUPPLY FULL NINE-DIGIT ZIP CODE: And what is your street address?

ONE FRAME

NOTE: PLEASE BE CAREFUL. SPELLING IS EXTREMELY IMPORTANT. ALSO, BE SURE TO RECORD THINGS LIKE "WEST" OR "NE" AND TO GET A HOUSE NUMBER, ROUNDED TO THE NEAREST HUNDRED IF NECESSARY. DO NOT ACCEPT INTERSECTIONS UNLESS YOU CANNOT GET A HOUSE NUMBER

Q68. So that my supervisor can verify my work, may I have your first name or initial?

ONE FRAME

Those are all my questions. Thank you very much for your time.

Q69. RECORD GENDER

1. MALE
2. FEMALE

Q70. RECORD LENGTH OF INTERVIEW

Q71. RECORD CITY

1. SEATTLE
2. PORTLAND
3. SAN FRANCISCO
4. LOS ANGELES
5. DALLAS
6. CHICAGO

Q72. RECORD DATE

Q73. RECORD PHONE NUMBER

Q74. INTERVIEWER ID